Declarative Development for Platform App Builders in Lightning Experience (DEX403)

ID DEX403 **Price** on request **Duration** 5 days

Who should attend

Ideal for programmers and point-and-click developers who want to understand the declarative development tools available on the platform.

Course Objectives

- Build and customize multi-user Salesforce applications.
- Create custom objects.
- Customize the user interface.
- Create advanced workflows and validation rules.
- Automate business processes with Process Builder, approvals, and flows.
- Manage your data.
- Develop a custom user interface using Lightning App Builder.

Course Content

Building Your Data Model

- Understanding Objects on the Lightning Platform
- Creating Custom Objects
- Creating Custom Fields
- Creating Relationships Between Objects
- External Objects
- Schema Builder

Profiles and Permissions

- Profiles
- Permission Sets
- Field Level Security

Controlling Access to Records

- Record Ownership
- Organization Wide Defaults
- Roles and Groups
- Sharing

Building Your User Interface

- Custom Applications and Custom Tabs
- Page Layouts
- Lightning App, Record, and Home Page
- Salesforce Mobile App
- Quick Actions

Record Types

- Record Types and the User Interface
- Meeting User Requirements

Introducing Business Logic

- Formula Fields
- Roll-Up Summary Fields
- Useful Operators and Functions

Monitoring Processes

- Debug Logs
- Developer Console

Preserving Data Quality

- Enforcing Conditionally Required Fields
- Enforcing Proper Data Format
- Enforcing Consistency
- Preventing Data Loss

Automating with Lightning Process Builder and Workflow

- Processes
- Scheduled Actions
- Workflow Rules

Automating Business Processes with Approvals

- Defining Approval Processes
- Options for Approving Records

Automating Business Processes Using Flow

- Understanding Flow

- Creating Flows
- Deploying Flows
- Autolaunched Flows

Save Order of Execution

- Exploring the Save Order of Execution
- Working with Transactions

Auditing Processes

- Auditing Configuration Changes
- Auditing Data
- Keeping Track of Unauthorized Changes

Deploying Your App

- Sandboxes
- Change Sets
- Alternatives to Change Sets

Data Management

- Data Operations (Export, Delete, Insert, Update, Upsert)
- Tools for Data Management
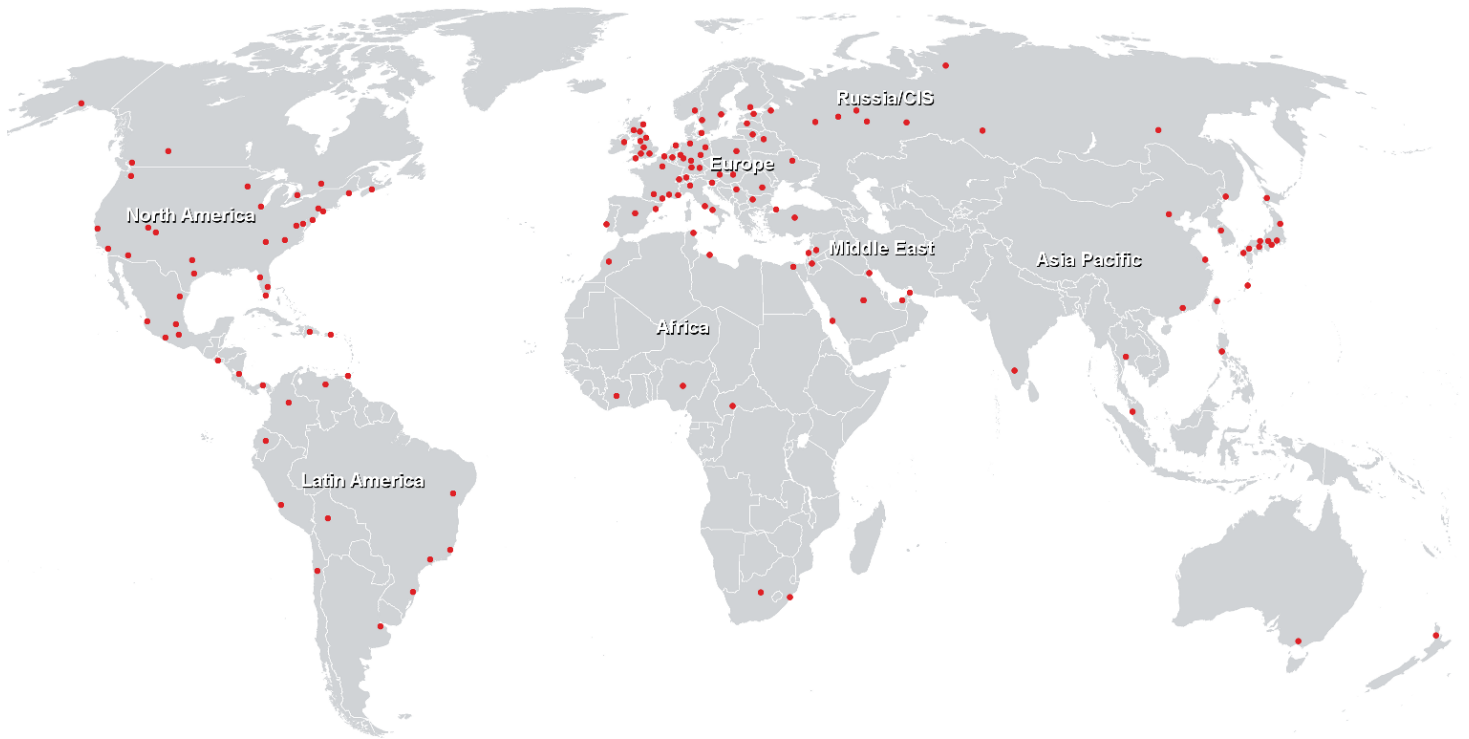- Bulk API

Reports and Dashboards

- Report Types
- Reports
- Dashboards
- Folders
- Reporting Snapshots

Deciding When Declarative Isn't Enough

- Declarative Limits
- Programmatic Alternatives

Final Project

Training Centres worldwide

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